User-centred Design of Context-sensitive Help

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Definition of Context-Sensitive Help (CSH)

- Ideally:
  Direct access to Help that is focused on the user's current needs
- In practice:
  this means Help is based on the user's current location, focus, and state within a software system

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Why is CSH important?

- Research has shown that guidance with context is more effective than guidance without context *

* Antonio Capobianco, LORIA, 2003

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What we'll look at today

- Established forms of CSH in Windows
- User-centred design goals
- The kind of information we should provide within CSH
- Possible CSH architectures
- Some guidelines on contextual Help

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This session does *not* cover

- Map IDs, header files, APIs, and how to implement context-sensitive Help
- (Let the programmers worry about those issues!)

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Established forms of CSH in Windows

- Keyboard shortcuts:
  - F1 displays Help on current window/dialog
  - Shift F1 – changes to What's This? Help mode
- Windows 95:
  trend away from screen-based Help to only What's This? Help
- 2000 onwards:
  trend away from What's This? Help to only screen-based Help
- Recent trend:
  embedded/contextual Help

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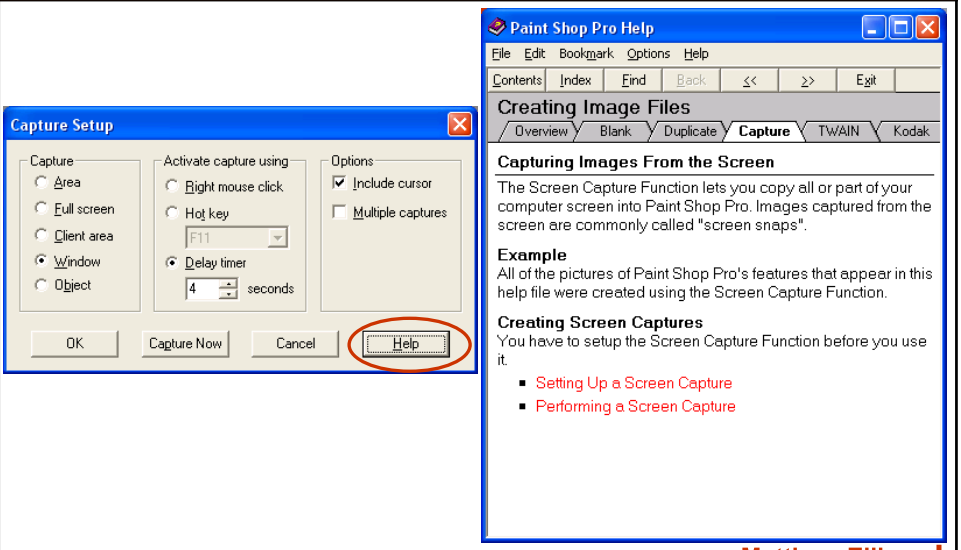
Dialog Help trends: Windows 3.1



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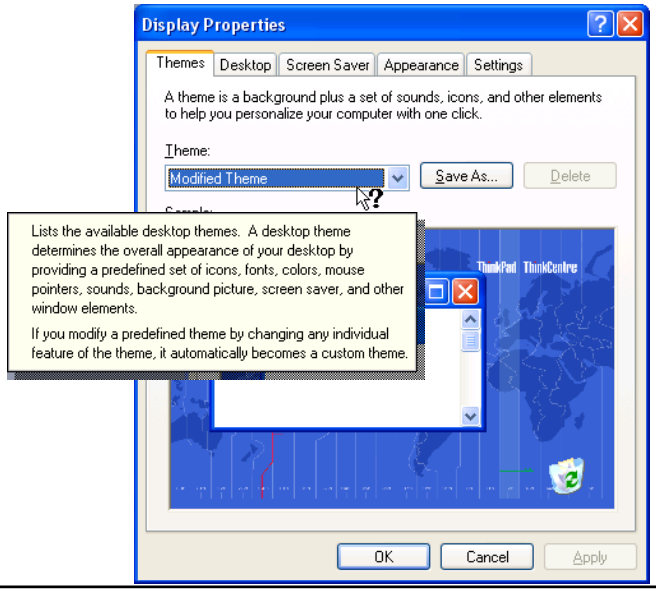
Dialog Help trends: Windows 95



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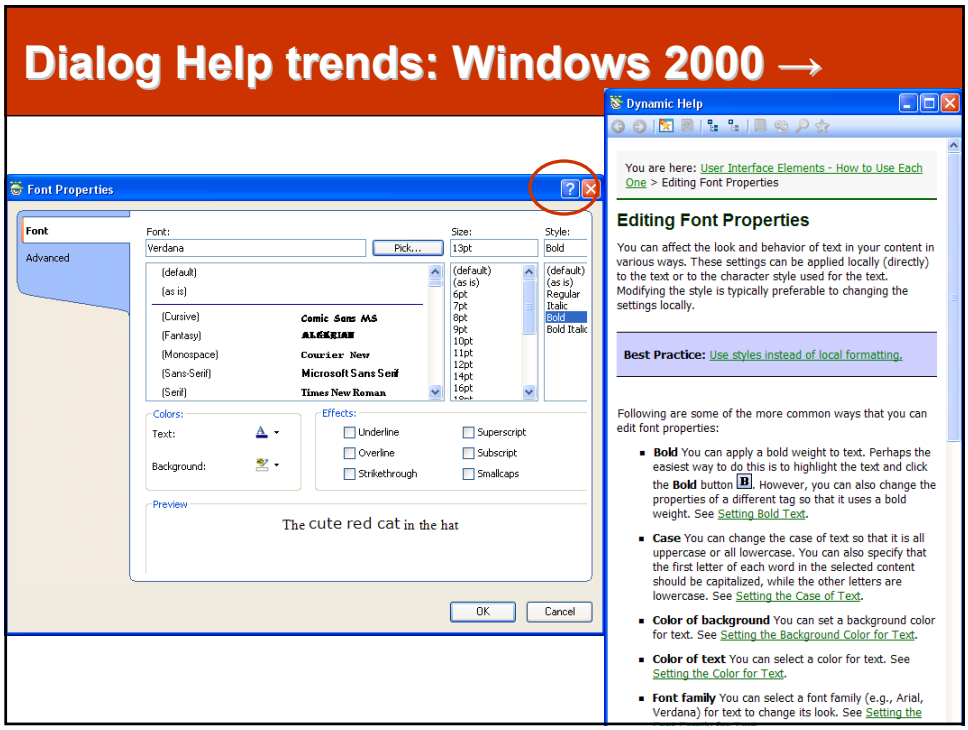

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What do we mean by *context* in a software system?

- Window/screen/form/dialog?
- Tab within a dialog?
- Current field/control?
- Other settings such as zoom level?
- Previous history?
- User role?
- Connectivity of PC?

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Traditional CSH topics

- Descriptive, not procedural
- Based on current screen/dialog
  - Overview of dialog including purpose
  - How to access dialog
    (only needed if CSH topic is available using other Help navigation methods)
  - Key concept(s)
  - Description of each/every field and control
  - Links to related procedures

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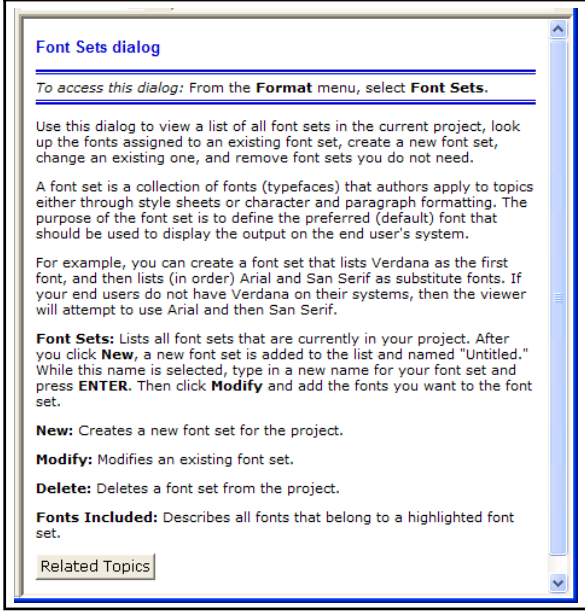
Example: RoboHelp X5



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User-centred design

- Users:
  - typically do not consult Help ahead of time
  - are engaged in a task when they need assistance
  - will only use Help if there is "scent of information"
  - want to minimise interruption to the task
- Goal: Keep the user in the task flow

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What to include in a CSH landing page?

- Reference information?
- Procedural instructions?
- Mix of both?
- Complex (unstructured)?
- How comprehensive?

- Help = Answers to questions
  - We need to know what the questions will be

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Typical user questions when selecting CSH

- What is this screen for?
- What do I need to enter in this field?
- Why do I need to provide this information?
- What does *xxx* mean?
- How do I …?
  (Perhaps less common than when user is searching Help or using the index)

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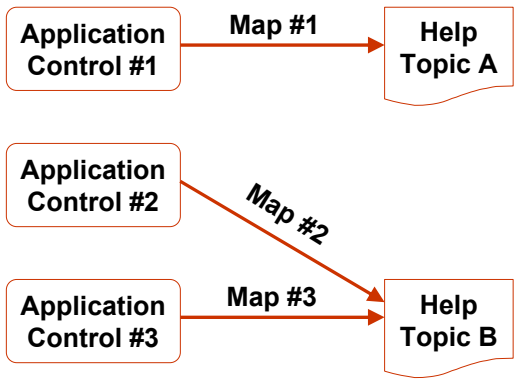
Usual CSH Workflow

- **One to One** or **Many to One**



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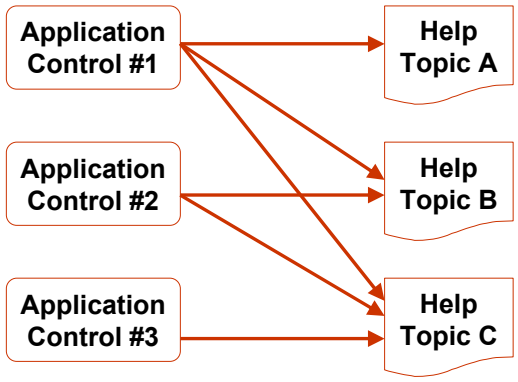
Potential CSH Workflow

- **One to Many**
  (a keyword-based approach)



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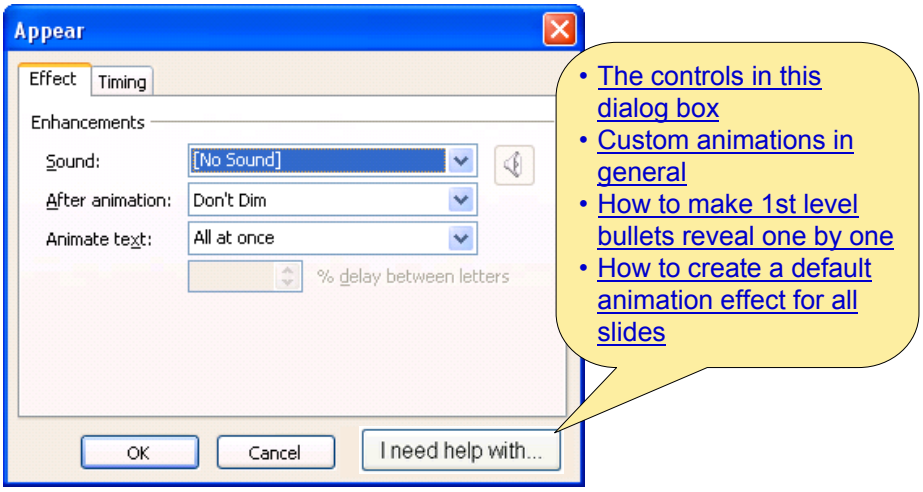
A possible CSH strategy



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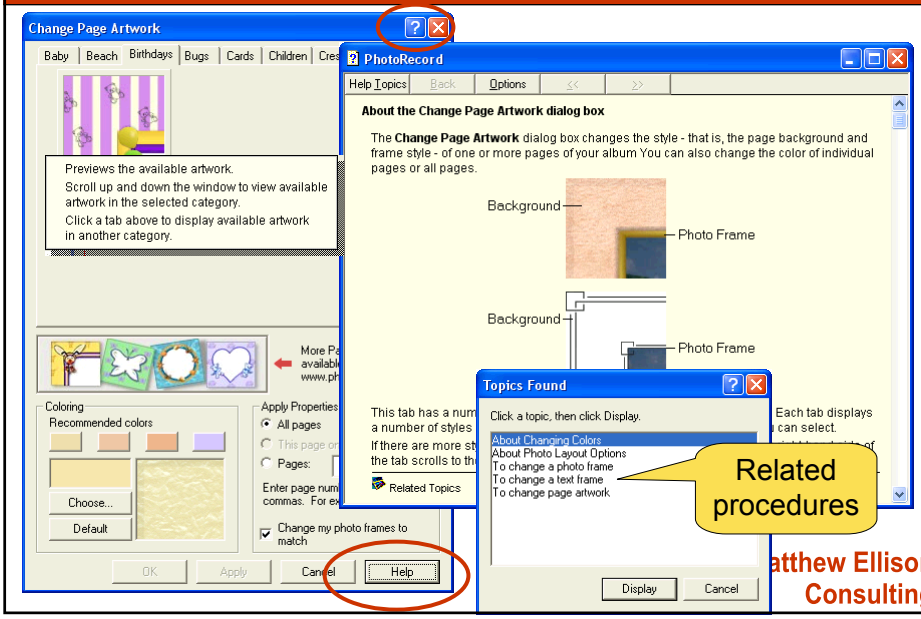
A common strategy: Link to dialog overview (Canon PhotoRecord)



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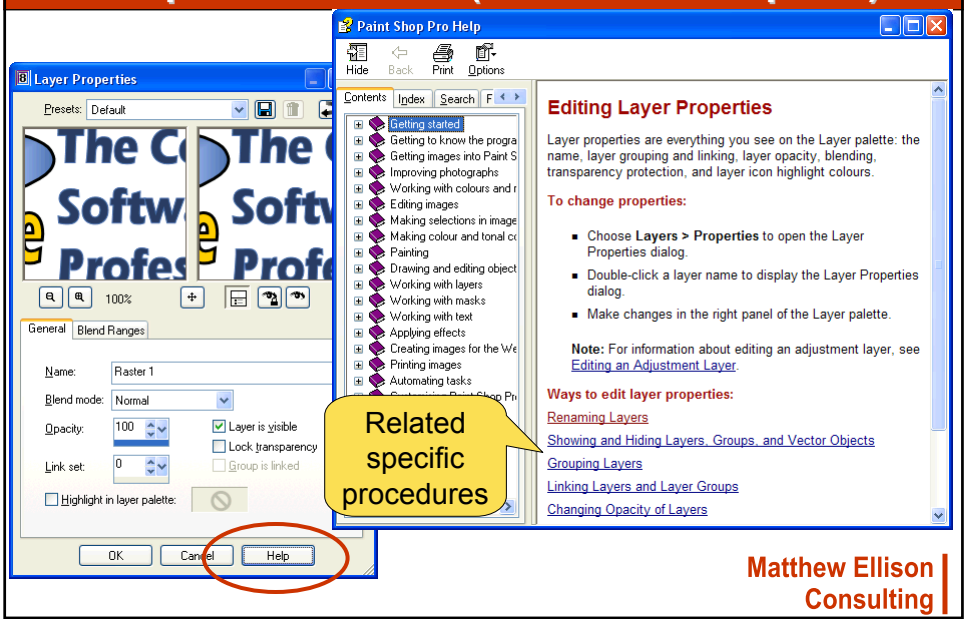
Another common strategy: Link to procedural info (Jasc Paint Shop Pro)



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Do users *really* want procedures from CSH?

- Compare the CSH for MadCap Flare versions 3 and 4
- Information type was changed from reference to procedural, apparently in response to requests from customers

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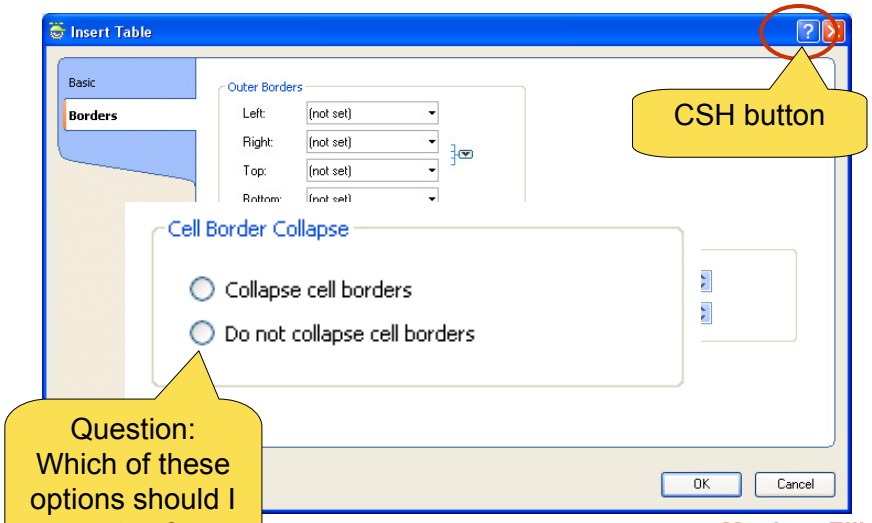
Example: Insert Table dialog



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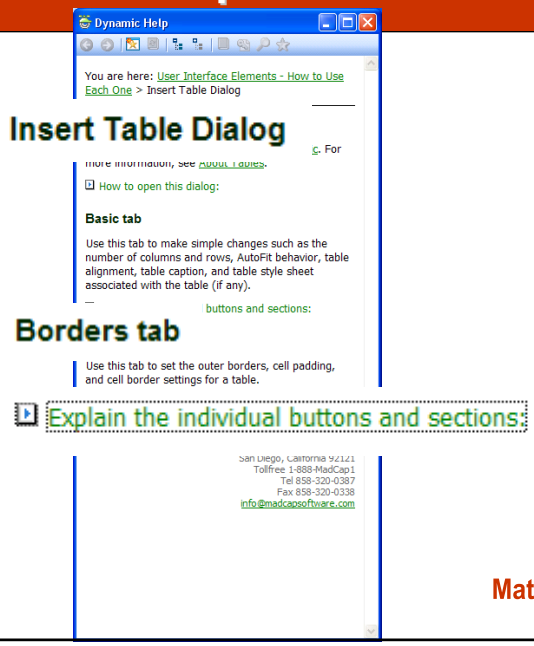
Flare 3: Reference topic



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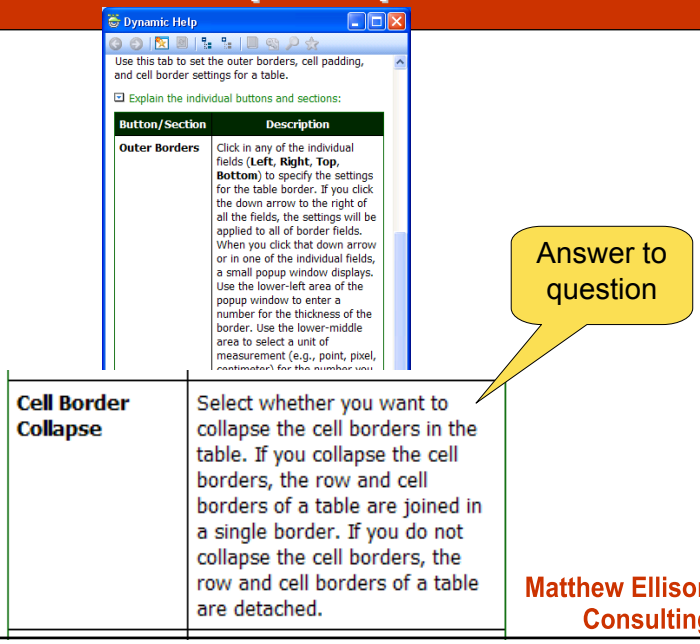
Flare 3: Reference topic expanded



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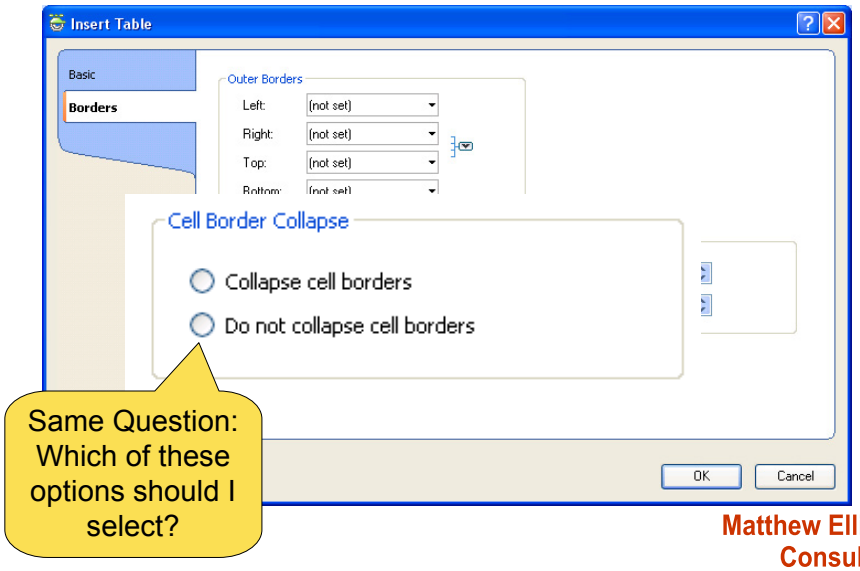
Flare 4: same Insert Table dialog



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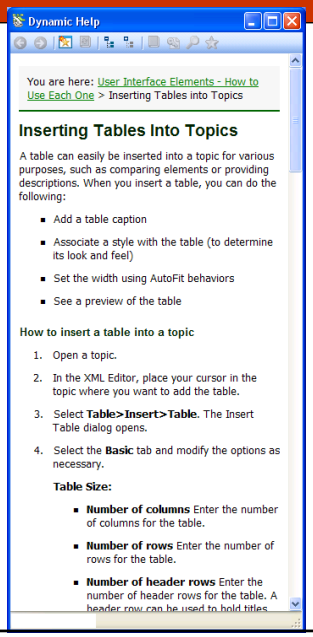
Flare 4: Procedural topic



Already completed

Inserting Tables Into Topics

A table can easily be inserted into a topic for various purposes, such as comparing elements or providing descriptions. When you insert a table, you can do the following:

- Add a table caption
- Associate a style with the table (to determine its look and feel)
- Set the width using AutoFit behaviors
- See a preview of the table

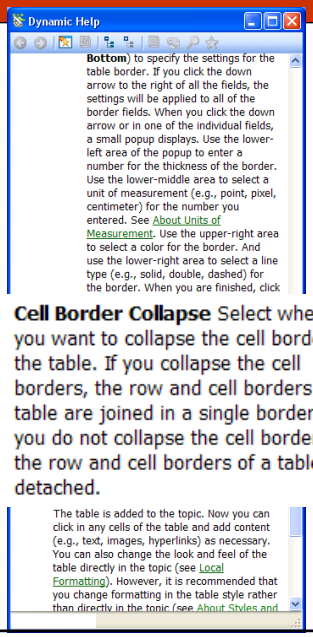
How to insert a table into a topic

1. Open a topic.
2. In the XML Editor, place your cursor in the topic where you want to add the table.
3. Select **Table>Insert>Table**. The Insert Table dialog opens.
4. Select the **Basic** tab and modify the options as necessary.

Table Size:

- **Number of columns** Enter the number of columns for the table.

Flare 4: Procedural topic – scroll to answer



Same answer to question

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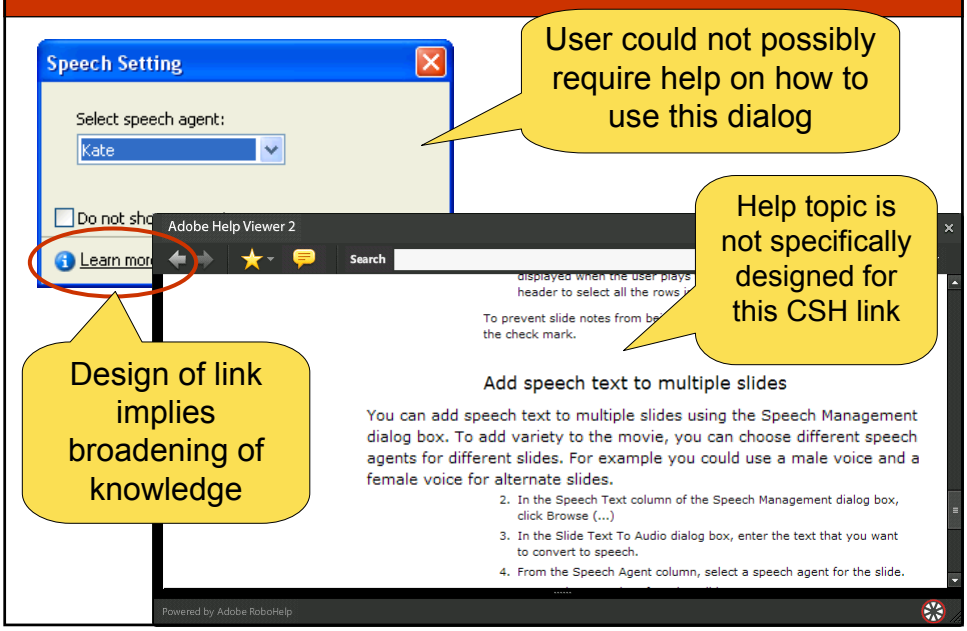
Link to broader procedural info (Captivate 4)



My own view on this issue

- CSH needs to provide quick and easy answers to mid-task questions
- These questions are often reference-based
  - "What is this?"
  - "What should I enter?"
  - "Which should I select?"
- I question whether procedural topics can be usefully re-used as CSH topics

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IBM's Task support clusters

- Presented by Michael Hughes at WritersUA Conference in Portland, Oregon (March 2008)
- A micro-architecture for user assistance
- Emphasis on CSH as "front door" to Help

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Strategy

1. Identify context sensitive links

2. Design a *task-support cluster* :
   - Self-contained group of topics that support a specific task

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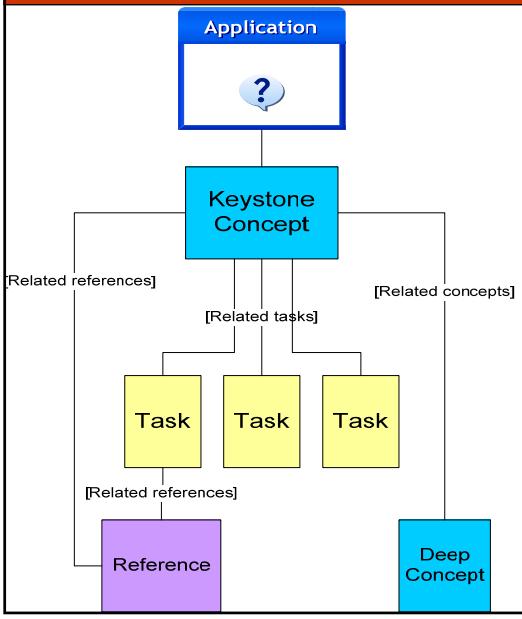
Task Support Cluster



- Entry point is normally "Keystone Concept" topic
- Entry point normally from app (CSH) but may be from TOC
- Breadcrumb and mini-TOC links **(but no links to other clusters)**

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Keystone Concept

- Provide critical conceptual information
  - Tips, examples, principles, insights
- Provide just enough support to get the user back on task
- Don't answer questions that users will never have!
- Help the user to navigate to deeper, relevant Help

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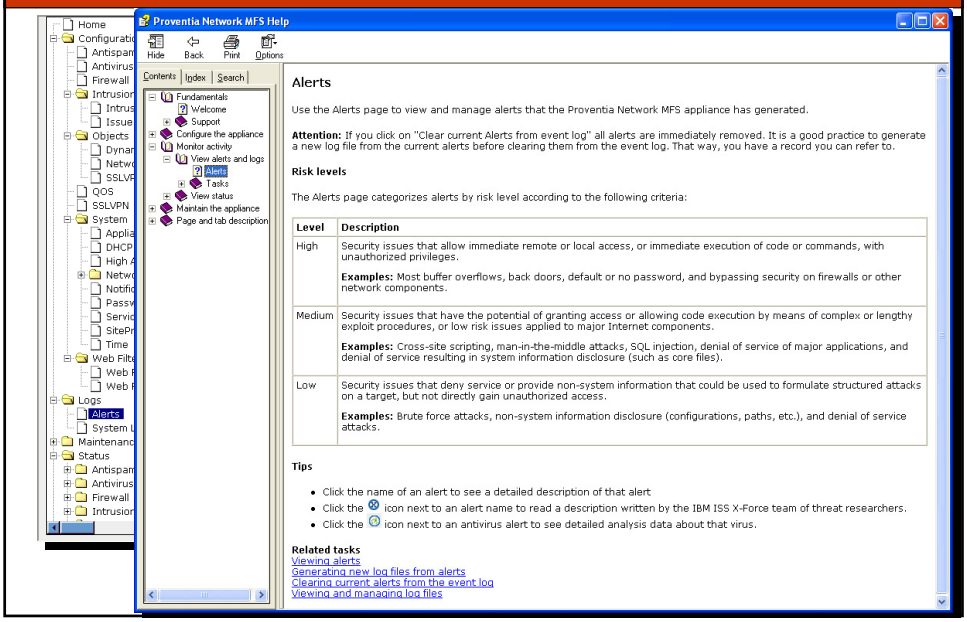
Example of Keystone Concept topic



How do we treat CSH as part of main Help?

- Searchable?
- Include in Index?
- Include in TOC?
  - If so, where?
  - Grouped with relevant task-based topics?
  - In special UI reference section?
- Perhaps it doesn't really matter

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Contextual Help

- Additional information that supplements/supports the main UI
- Assistance that is displayed in a pop-up window or beside some key fields
- Answers common questions without requiring users to leave the application UI
- Favoured by web applications

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Options for displaying contextual Help

- "Inline" Help
- Expanding/drop-down text
- Dedicated embedded window
- Pop-up window

"Help may in fact be a great example of an appropriate pop-up: the text should definitely be short and it is best to be able to see the help without changing or obscuring the original context"

Jakob Nielsen

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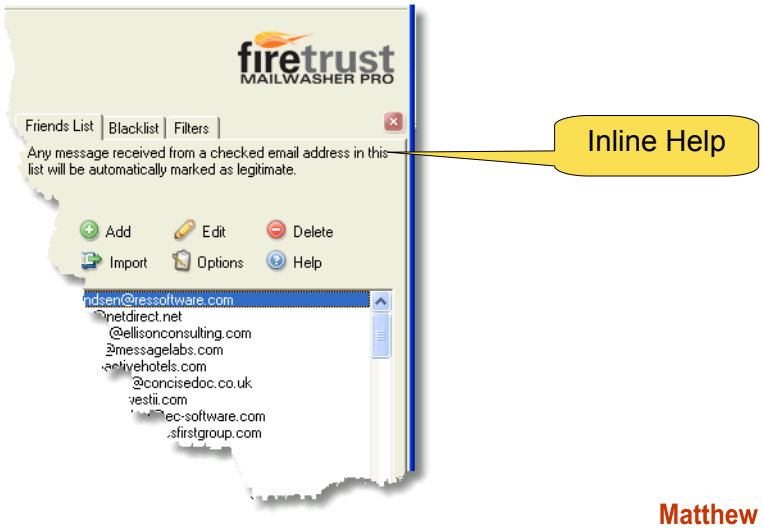
Inline Help example: MailWasher Pro



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Inline Help: Guidelines from Sun

Scope of the Inline Help	Recommended Length
An entire page of an application	One to three short sentences
A page section that is titled or otherwise visually separated	One short sentence
A single entry field	One short sentence or, preferably, one phrase

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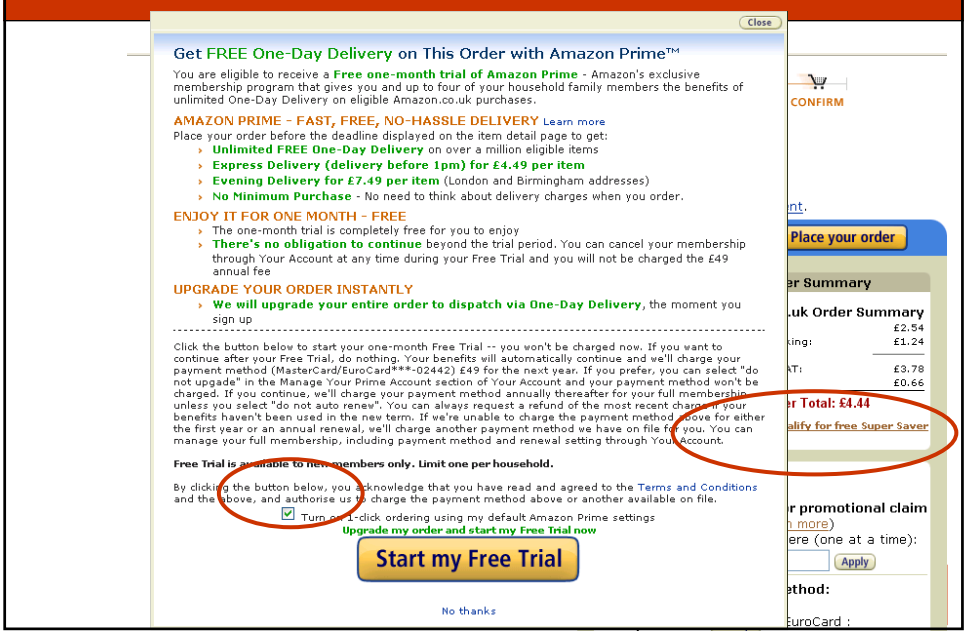
Pop-up example: BBC

Pop-up example: Amazon



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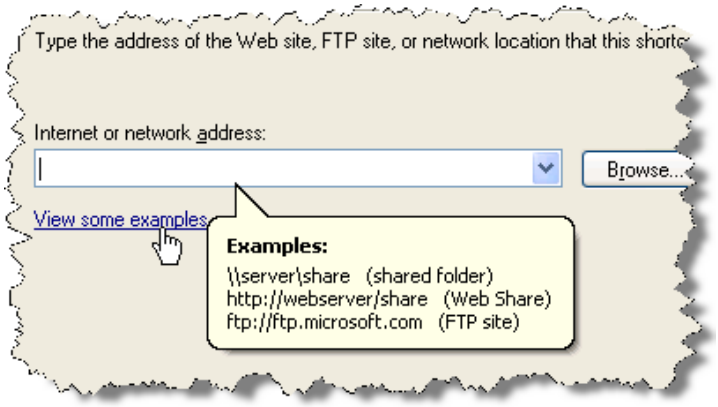
Contextual Help in desktop applications: Windows XP



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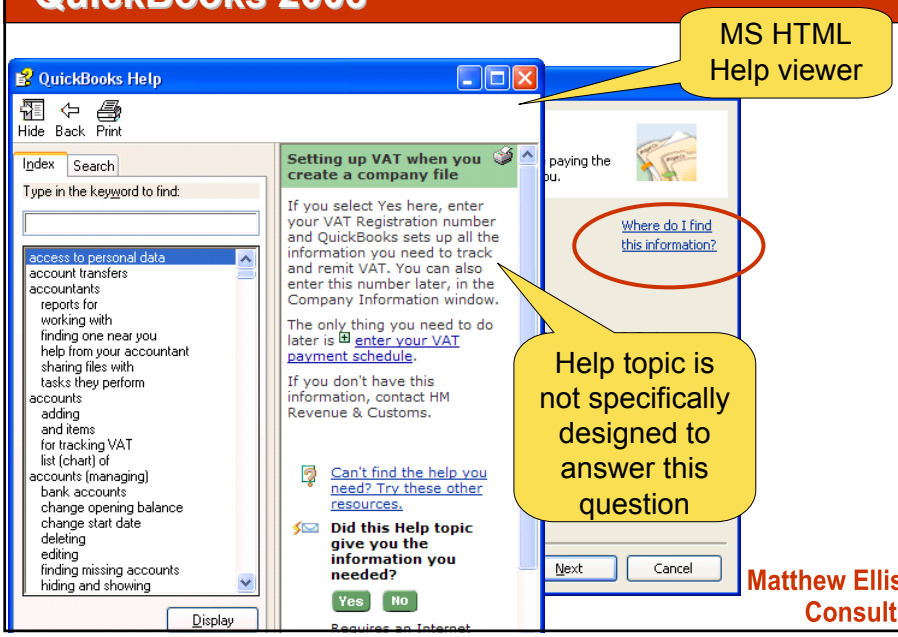
Contextual Help in desktop applications: QuickBooks 2008



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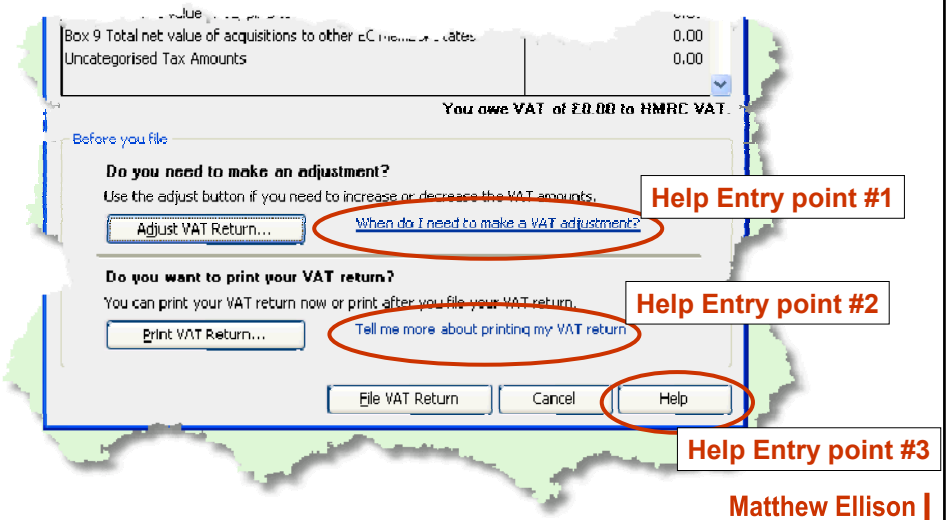
Contextual Help in desktop applications: QuickBooks 2008



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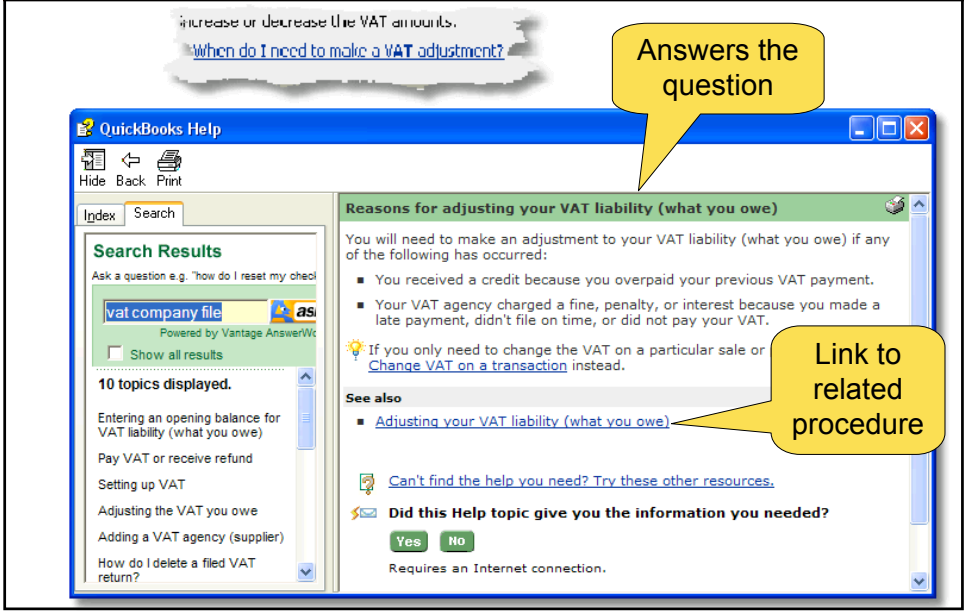
Help Entry point #1



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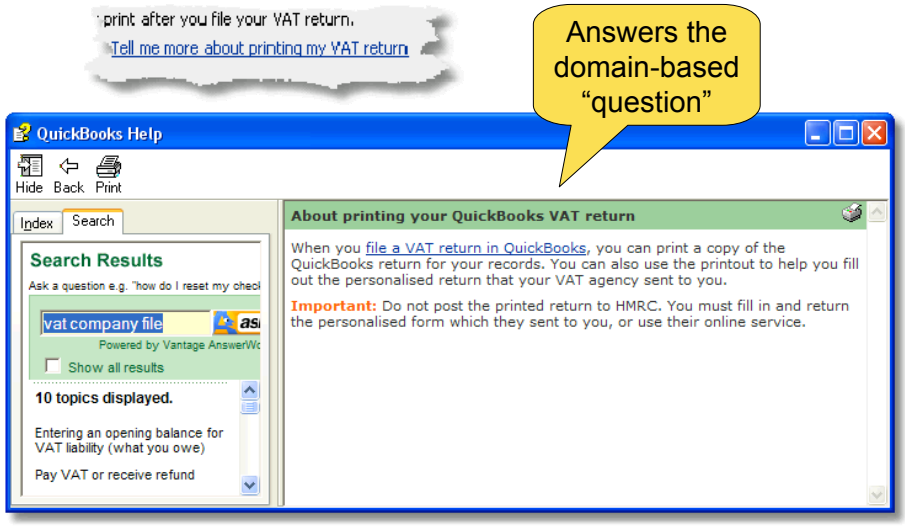
Help Entry point #2



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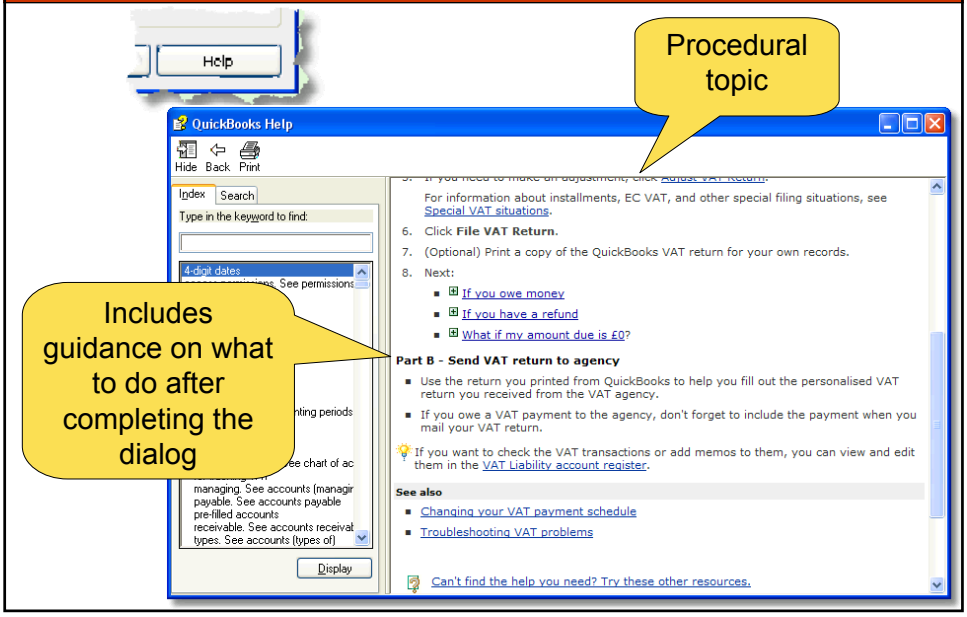
Help Entry point #3



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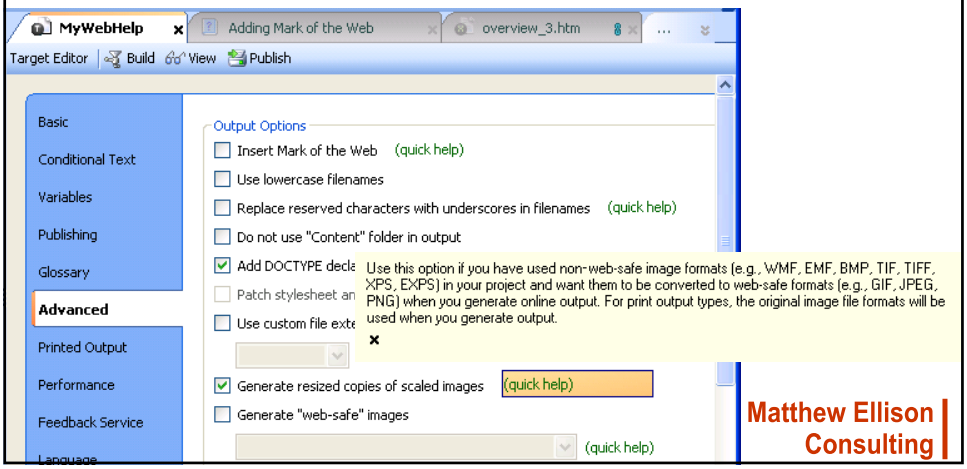
Contextual Help in desktop applications: MadCap Flare 4



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MadCap Software and Intuit – a common CSH strategy

This control:	...displays this type of information:
Main Help control	step-by-step instructions on the current task
Hyperlink beside individual field	answer to specific question

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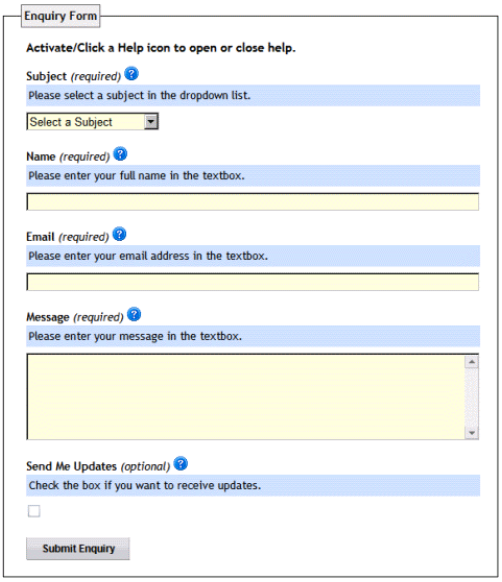
Only add contextual Help where it is needed



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Layered Contextual Help: Linking to "Deeper" Help

- Contextual Help may not answer users' specific questions
- Users may require:
  - More detailed information
  - Key concepts
  - Step-by-step instructions
- Optional links within contextual Help provide a solution

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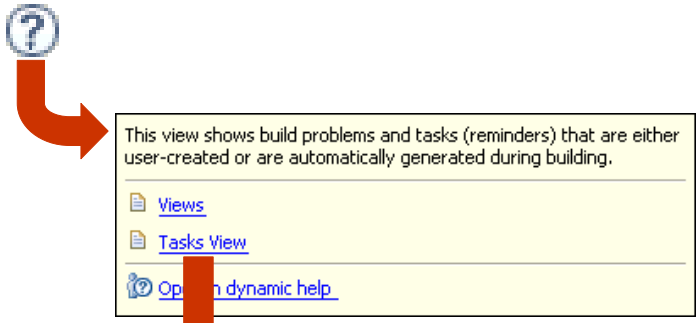
Example: IBM Infopops



- Help browser opens to selected topic
- List of related links stays in the left hand frame

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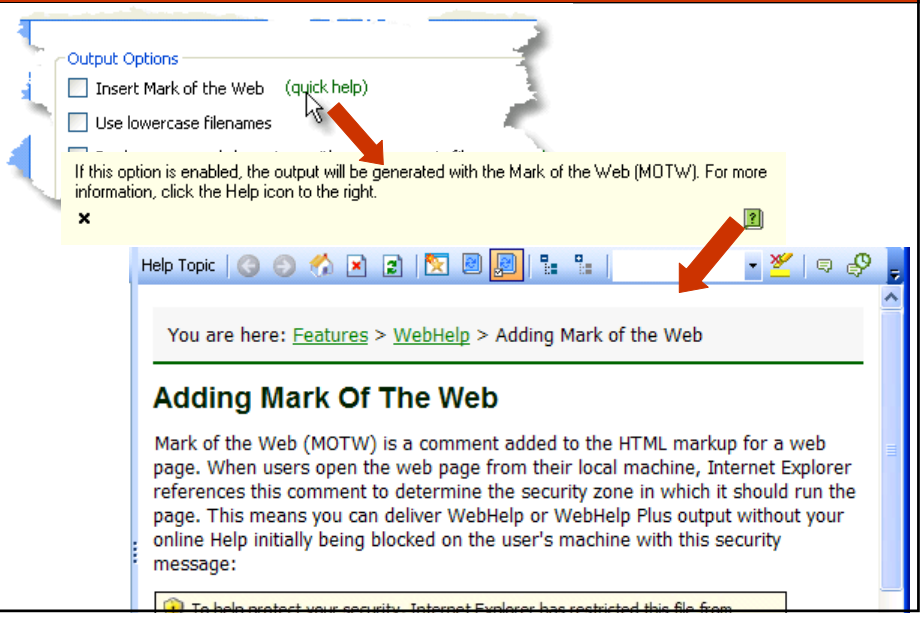
Example: Flare's Quick Help



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Future possibilities: Procedural contextual Help

- Provides sequence in addition to description and explanation
- Two possible implementations:
  - Balloon Help
  - Guided Help

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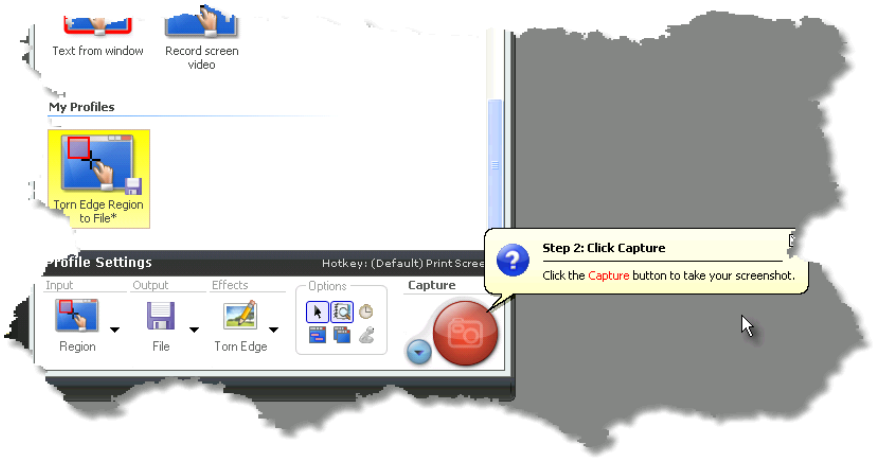
Balloon Help in SnagIt 9.2



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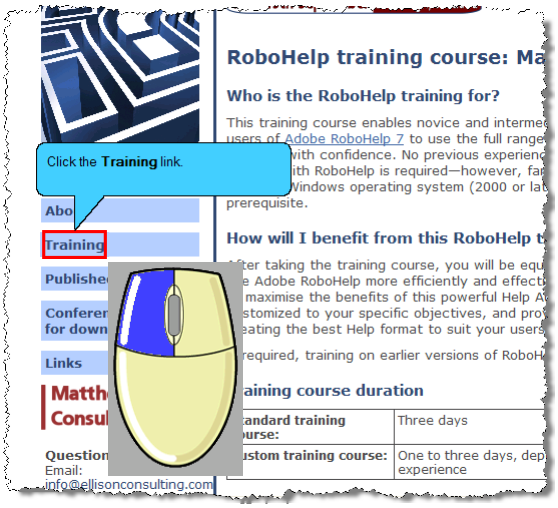
Guide Help

SHO Guide™



SHO Player (free to distribute)

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Summary

- CSH may be the most frequent way that users access Help
- You should plan your CSH strategy and write dedicated CSH topics
- Focus on answering likely questions rather than documenting the application
- Procedural CSH is becoming popular
- Contextual Help with links to regular Help topics may be an effective strategy
- Work with UI developers on designing CSH access and contextual Help
- Guided Help may be an effective way of providing procedural assistance in context

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References

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- *Context Sensitive Help Concepts*
  by Don Lammers
  http://tinyurl.com/6xular
- *Accessing context-sensitive help*
  (guidelines from IBM Eclipse documentation)
  http://tinyurl.com/5r5xpx
- *Access points for context sensitive help*
  (discussion from IxDA archives)
  http://tinyurl.com/5lbhsc
- *User Assistance Design Patterns*
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  http://tinyurl.com/6h6fqo

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  (Sun Web Application Guidelines)
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- *The Anatomy of a Help File: An Iterative Approach* by Michael Hughes
  http://tinyurl.com/5qf7gp
- *Keeping It in Context Part Deux: Contextual Help* by Kimmy Paluch
  http://tinyurl.com/6y2tbd
- *Contextual Help and its Effects on Human Working Memory Load* (proposal for Contextual Help in KDE)
  http://tinyurl.com/6dtw3b
- *Context-sensitive Help For Multimodal Dialogue* (AT&T Labs – Research)
  http://tinyurl.com/5hew5l

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Please complete your evaluation forms

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